

Global Telecoms Insights 2009



Contents

- Philosophy
- Overview
- Content
- Design
- Timings
- Deliverables
- Example output from 2008 study



GTI 2009 is designed to provide insight into the four key drivers of the telecoms market

Consumerisation



Why do consumers act the way they do?
What will they do next?

Convergence



How converged is consumer behaviour?
And how convergence-ready are they?

Mobility



Are consumers using their mobile potential?
How do different mobile devices and services interact?

Innovation



Which features and services are positioned for future growth?
Which niche brands will become mass market?



Content is focused around mobile telephony with additional sections addressing convergence issues

- Some of the main themes are covered in more detail below

Market understanding

Consumer profiling across markets

Channel evaluation

Touchpoint evaluation

Purchase triggers

Payment plans

Category involvement

Interplay of personal vs business use

Usage

Feature and service use, frequency of use, future demand

Deep dives into several features

Network and handset brand used

Use of phone for business reasons

Drivers of multiple phone use

Brand

Brand commitment measurement

Brand preference

Openness to competitor brands

Brand profiling

Future growth opportunities

Convergence

Usage and desire for multi-play

Desire for converged devices

Drivers of convergence

Interplay of fixed line mobile and VOIP services

Interplay of SMS, MMS, email and IM services

The most appropriate methodology will be used for each market

- Representative sampling of the population aged 16 to 60
- A mobile owner booster will be implemented in developing markets to obtain a minimum of n=300 owners
- Mainly CATI or F2F
 - On-line only in markets with high internet penetration
- Markets:
 - 31 markets included
 - Methodologies from previous wave have largely been retained for comparative reasons
 - Larger sample in India will allow segment levels and regional analysis
- New markets for 2009 are Singapore and Pakistan

2009 GTI	Method	Sample
China	F2F	n=800
Japan	Online	n=500
India	F2F	n=3600
Pakistan	F2F	n=500
Korea	Online	n=500
Indonesia	F2F	n=500
Australia	Online	n=500
Thailand	F2F	n=500
Hong Kong	Online	n=500
Singapore	Online	n=500
Taiwan	Online	n=500
Vietnam	F2F	n=500
Germany	Online	n=500
UK	Online	n=500
Italy	CATI	n=500
France	CATI	n=500
Spain	CATI	n=500
Russia	F2F	n=500
Netherlands	Online	n=500
Sweden	Online	n=500
Egypt	F2F	n=500
Saudi Arabia	F2F	n=500
South Africa	F2F	n=500
Morocco	F2F	n=500
Kuwait	F2F	n=500
UAE	F2F	n=500
Brazil	F2F	n=800
Mexico	F2F	n=500
Argentina	CATI	n=500
USA	Online	n=1000
Canada	Online	n=500

Timings

Action	Date
Fieldwork	November
Data processing	18 November – 12 December
Reporting wave one (Global Report)	15 December – 19 December
Launch of GTI 2008/09 Global Report	23 December
Reporting wave two (Focus Reports, regional and local market reports)	23 December – 26 January
Launch of Focus Reports and local country reports	February

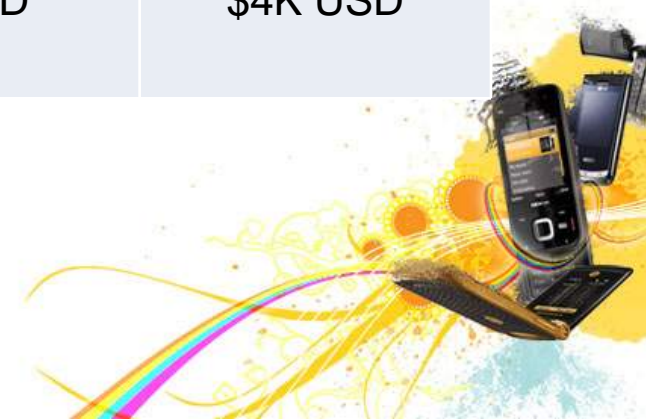
Notes:

- These timings are provisional and are dependent on TNS and partners clients



Deliverables

Package	Deliverables	Cost for Multinational use (3+ countries)	Cost for use in 1-2 countries
Global	PowerPoint global report, full data tables, raw SPSS data file, bespoke face to face presentation	\$50K USD	\$25K USD
Local market	PowerPoint global report, full data tables, bespoke face to face presentation	\$9K USD	\$8K USD
Regional (APac, Europe, the America's, MENA)	PowerPoint global report, full data tables, bespoke face to face presentation	\$28K USD	\$15K USD
Focus Reports	PowerPoint global report on specific subject areas (i.e. Youth, Convergence, Mobile Internet etc. Subjects TBC)	\$5K USD	\$4K USD





Case study from 2008 GTI

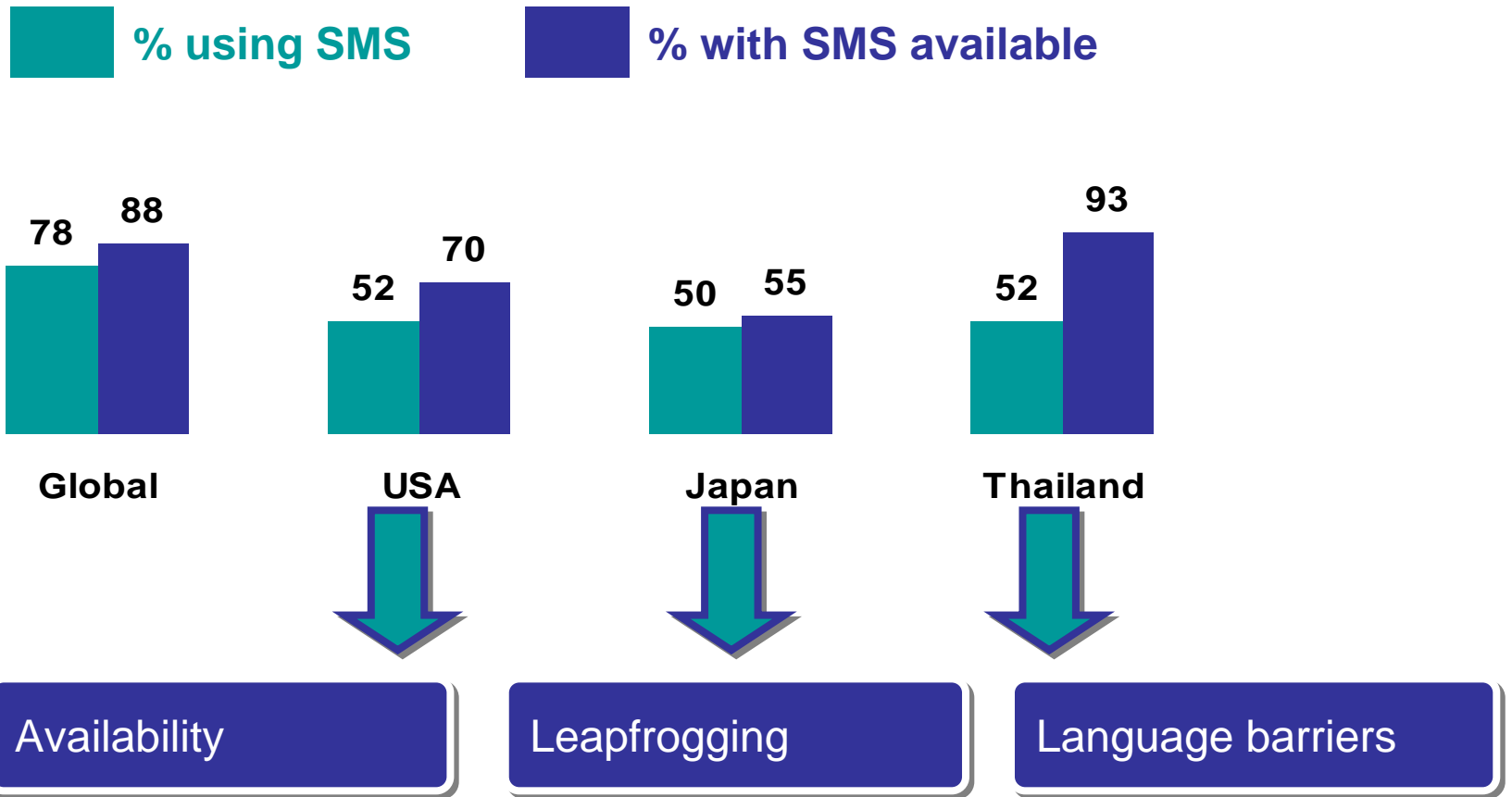
A point of view on messaging



Sam Curtis

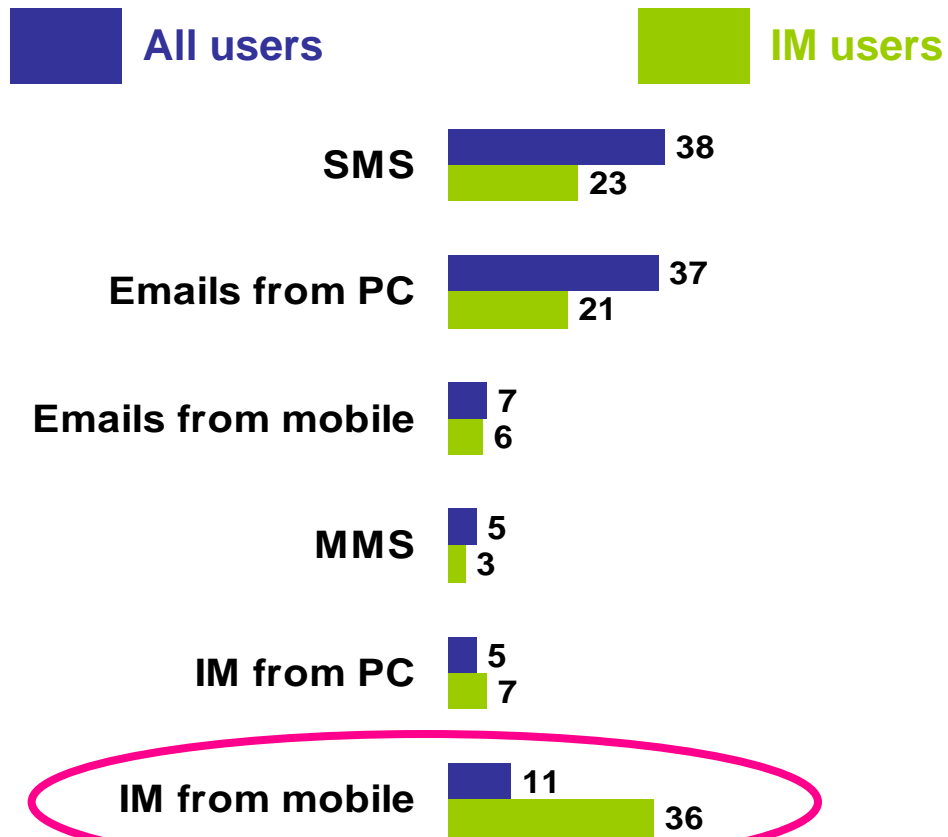
May 2008

Use of SMS is not entirely universal



Instant Messaging replaces other messaging forms when adopted

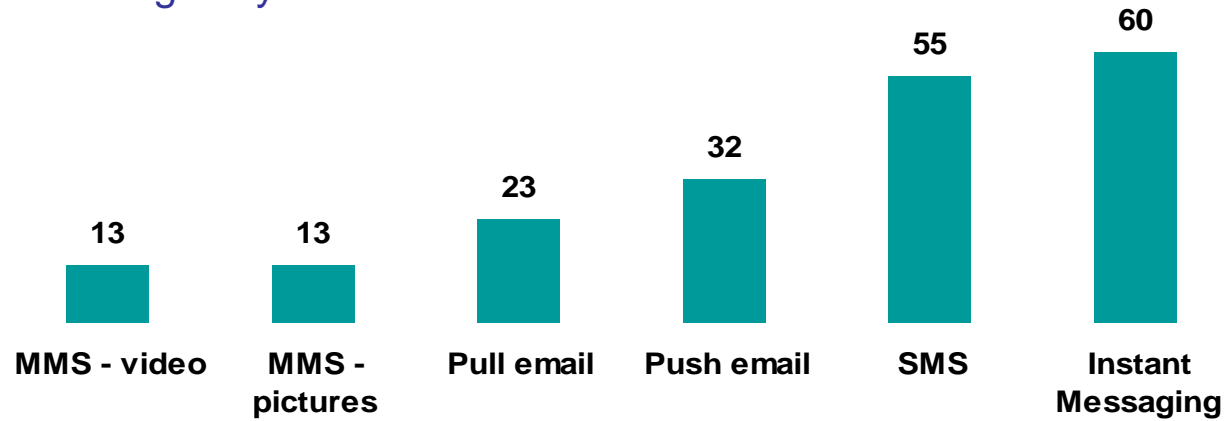
Mean use of messaging formats (Messages out of 100)



Big implications for operators!

IM is the most used non-voice feature

% using daily



Low cost

Familiarity

Connectivity

Guess the price...

Cost of 1MB of information from GPRS data transfer

\$4 USD

Cost of 1MB of information from the Hubble Telescope

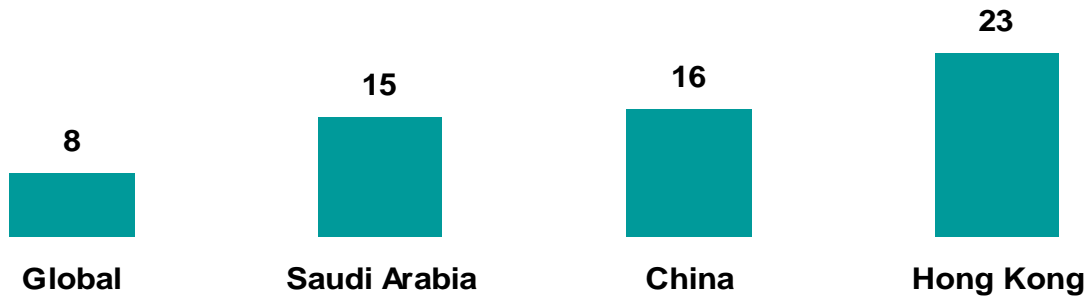
\$160 USD

Cost of 1MB of information from SMS

\$700 USD

Take up in China is particularly impressive

% using IM



% interested in using among non-users



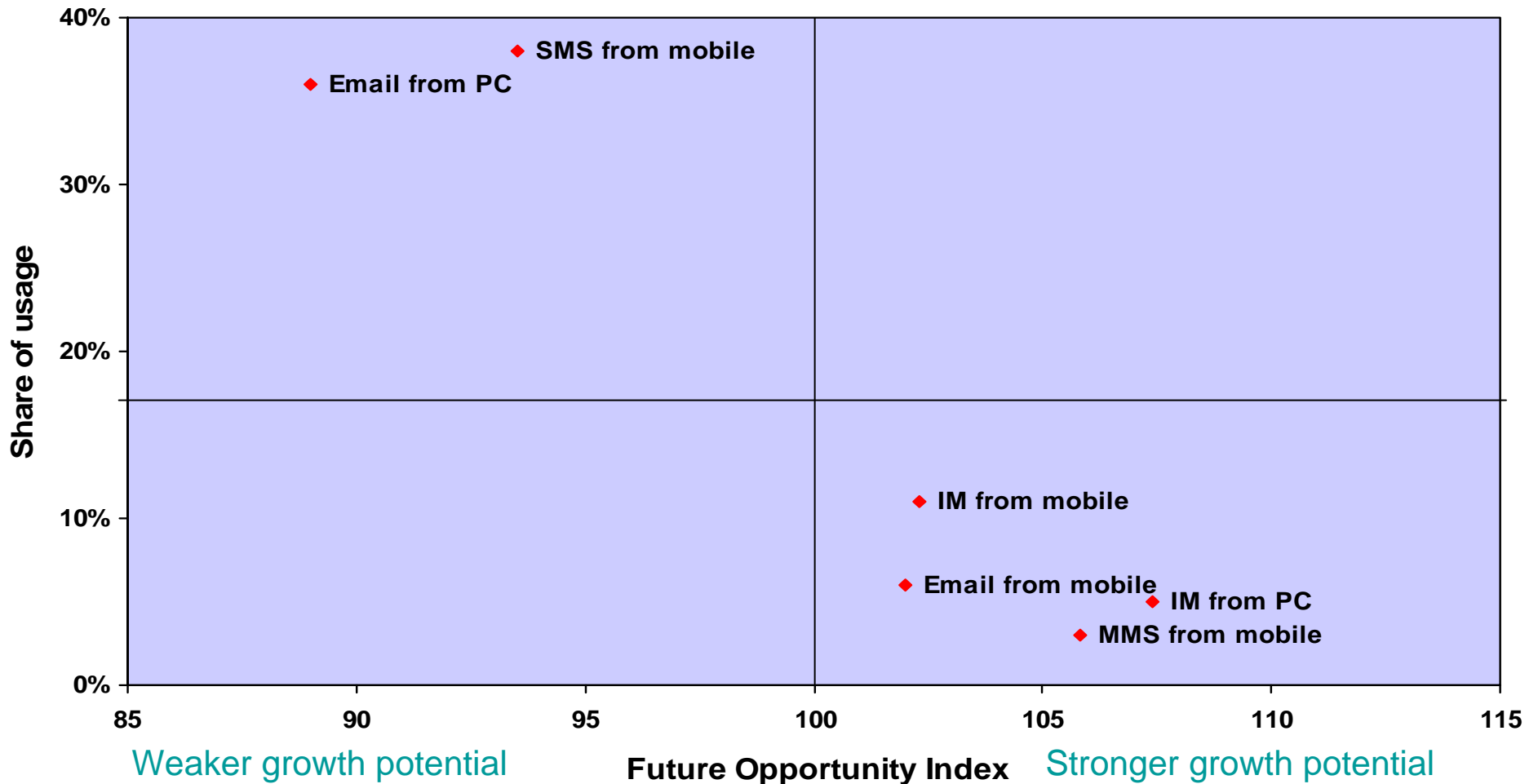
Future influence

How are future-influential consumers different?

A model of consumer behaviour

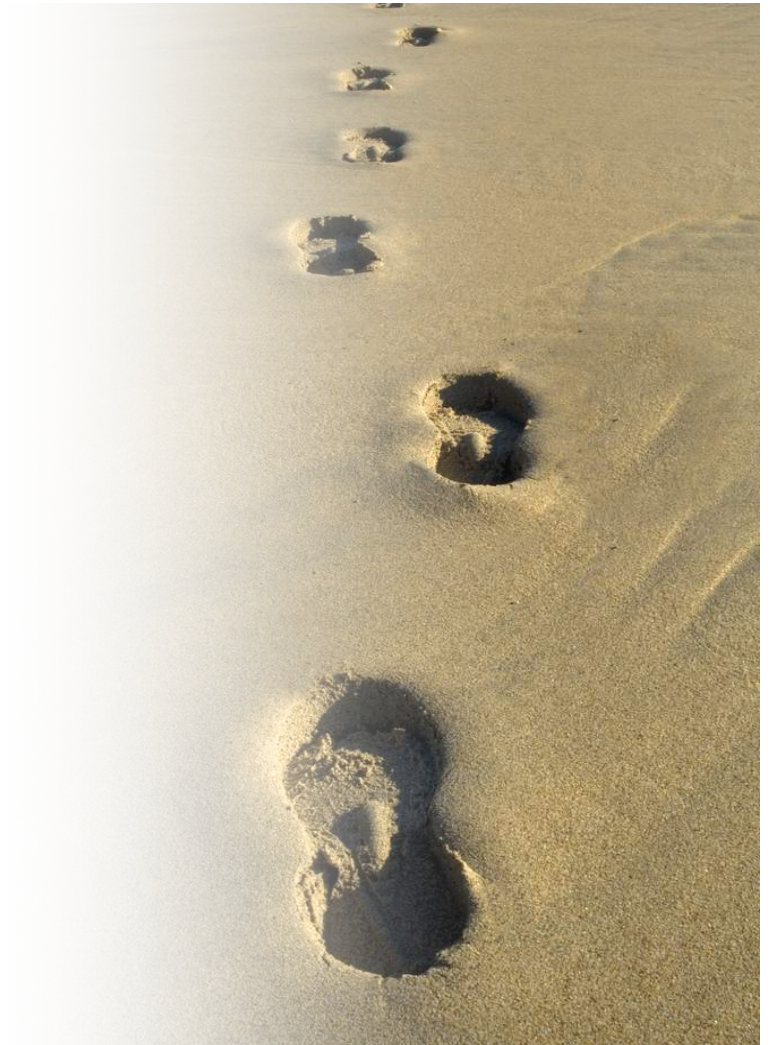
- Not all consumers are equal
- Some are more future influential than others
- Which niche services have the best chance of entering the mass market?
- Which established services are best positioned to continue growth and which will struggle?

Other messaging forms will take usage share from SMS and email from PC



So...

- MIM and mobile email will cannibalise usage share of SMS and email from PC
- MIM presents a massive opportunity in China
- Messaging will become a stronger purchase driver





Case study from 2008 GTI Opening the door to mobile internet

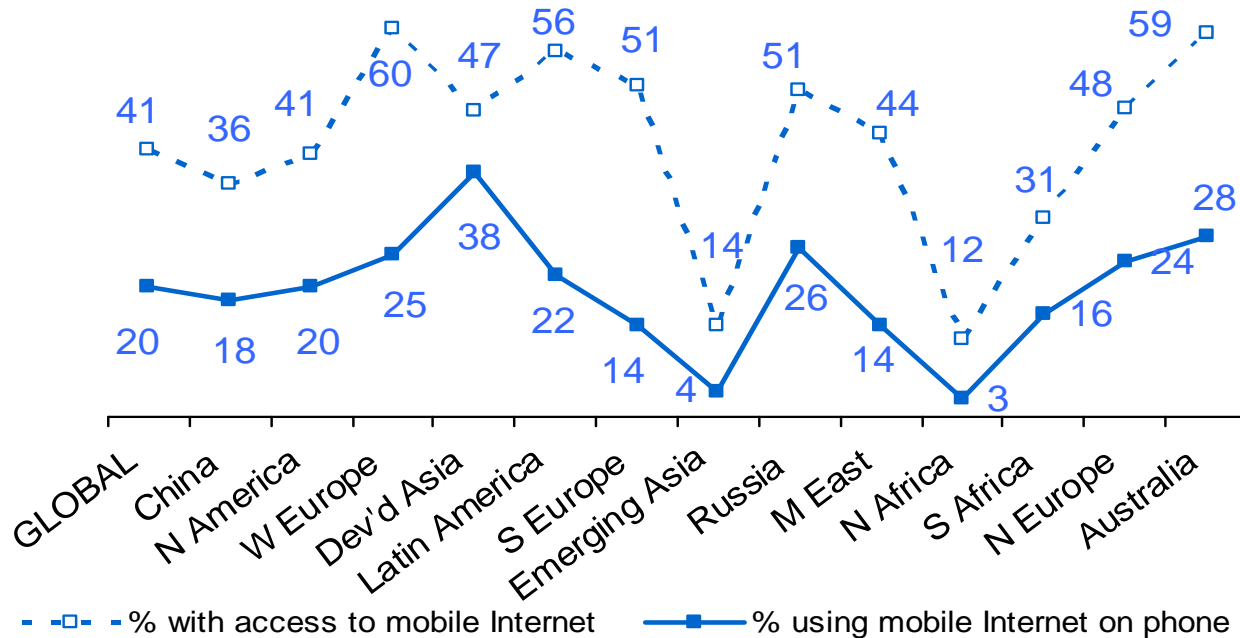


Sam Curtis

May 2008

Barriers are preventing take-up of mobile internet services

Mobile internet availability & usage



Lack of perceived need

Cost transparency

Service delivery problems

Leading mobile internet markets have seen usage fall

% Using mobile internet - Korea

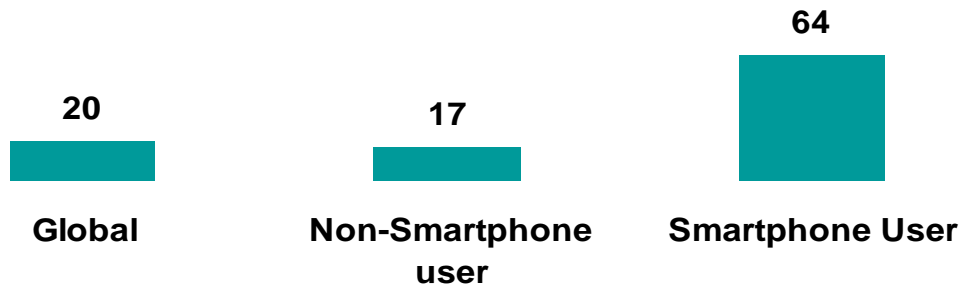


% Using mobile internet - Japan



Could the new generation of Smartphones have won?

% Accessing the mobile internet



More experienced users

Better functionality

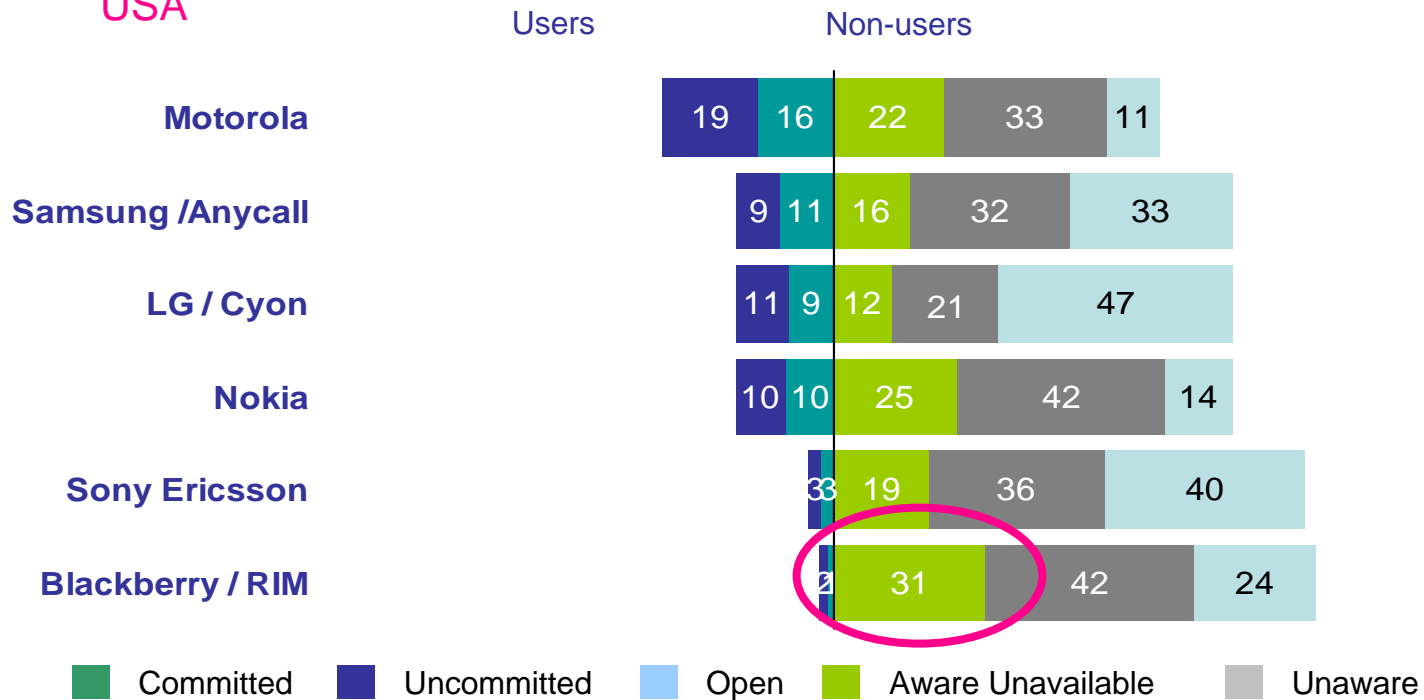
More likely to have suitable payment plan

“Google ‘hits’ from iPhones are 50 times higher than for other handsets”

Source: appleinsider.com

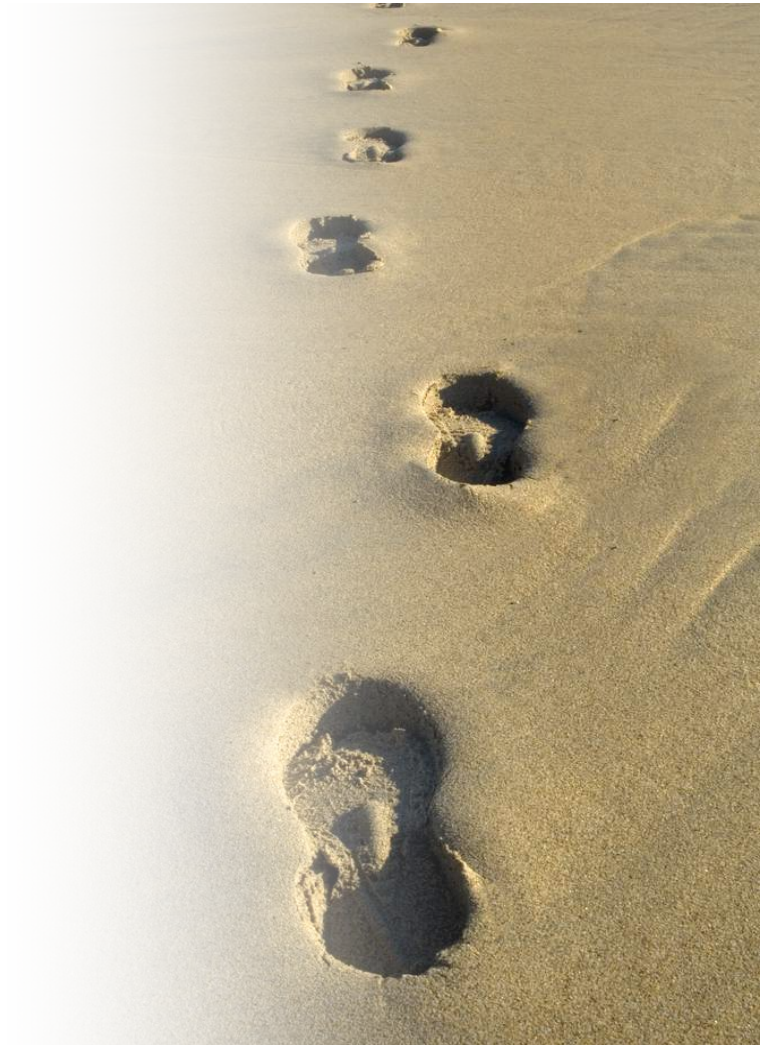
Niche providers are showing mass market potential

USA



So...

- Supply is outstripping demand in mobile internet services
- Leading markets are seeing declining usage
- Smartphones present an opportunity but competition is fierce



Please contact Hiroki Ikeda for any further information:

Hiroki Ikeda

Sector General Manager – Global Technology

TNS-Infoplan

03-3265-5411

hiroki.ikeda@tns-global.com

